

# Roadmap to Implementing Your Technology Grant

*National Technology Assistance Project – October 2002*

## Overview

No matter whether you are new to tech project management or an expert, this Roadmap provides at-a-glance reference to steps to success in implementing tech initiatives within legal services.

## **Before You Begin: Know the Five Steps to Success**

- Step 1: Identify the Project Manager
- Step 2: Develop an Implementation Strategy
- Step 3: Design and Deploy the Technology Application
- Step 4: Develop a Plan to Maintain and Support It
- Step 5: Develop a Plan for Management and Sustainability

## **Step 1: Identify the Project Manager**

This might seem obvious, but even the best of us have overlooked this first step. Any new project, no matter how many partners and executive leaders it involves, needs to have an assigned project manager. The project manager is the central person who understands the roles of everyone involved, knows the ultimate objectives, timeline, and deliverables, and keeps everyone informed, on-task, and within budget.

## **Step 2: The Implementation Strategy**

An implementation strategy defines the project: the scope, staffing, deliverables, timeline, partners, technology, and budget. The first step of a project manager is to articulate this strategy.

## **An Implementation Checklist for Project Managers**

- **WHAT?** What the project will achieve? the product?
- **WHO?** Who develops and implements it? What is the role of staff, vendors, contractors, and partners?
- **HOW?** What technology applications and with what tech architecture will the project be implemented?
- **WHEN?** What is the timeline for each phase and each deliverable?
- **HOW MUCH?** What is the overall budget, and how much will each phase be?

**Project Deliverables**

It is important for the Project Manager to understand the funded objectives of the grant, the priorities of development, and what is expected at the year's end.

**A Team Approach: Staff, Vendors, and Partners**

A project manager decides which functions should be achieved by existing staff, new staff, vendors, or contractors. A team-oriented environment often promises success.

- ❑ Identify Work That Can Be Assigned to Current Staff
- ❑ Identify Project Task(s) that Parallel Current Staff Tasks
- ❑ Work with Staff Members to Integrate Task(s) Into Workflow
- ❑ Start with Possible and work to Impossible
- ❑ Create a Team Oriented Environment
  - Hold regular Project Meetings
  - Focus on Task Oriented Successes Large or Small
  - Identify Project Weaknesses as a Group
  - Find Solutions for Task Failures as a Group
  - Identify Cause and Effect of Task Successes and Failures as a Team

**Vendor Management Reminders**

- ❑ Vendors offer "Solutions of the Day." (Make sure you know when to use them for your project and how to select them. If you're not sure when to use vendors, ask for help from NTAP.)
- ❑ Solicit bids by putting out a Request for Proposals (RFPs). (RFPs help you articulate what specifically you expect the vendor to deliver. See sample in materials.)
- ❑ Make Sure Proposals Address your RFP Item by Item
- ❑ Make Sure All Proposal are Apples to Apples Before Selecting a Solution
- ❑ Emphasize Non-Profit and Community Oriented Nature of Your Project (Approach hi-tech companies with partnership offers)
- ❑ Offer to Share any Community Publicity Associated with Your Project
- ❑ After Selection, Hold An Initial Meeting To Discuss Project Goals
- ❑ Get Firm Delivery Schedules for Products and Services in Writing
- ❑ Non-Performance Clauses Often Provide Incentive for Quality Service
- ❑ Make Sure that any Development Contracts Include Ownership of Source Code
- ❑ Keep Vendors in-check on Major Budget Decisions, Spending, & Timelines

**Build Strong Partnerships**

- ❑ Identify Key Partners: These may be programs who can help deliver your project, will interface with it once deployed, can help sustain it, and who serve the same clients. (For example, other legal services, public interest agencies, social services, libraries, technology executives, and courts.)

- ❑ Hold Partnership Meetings Regularly
- ❑ Encourage Open Forum Discussions
- ❑ Silent Partners Usually Have Something to Say
- ❑ Make Sure You Follow Through on the Status of Partnership Commitments

**Technology Infrastructure** (For more information, see materials on this session.)

**Timelines and Usability: Note Milestones & Evaluation Goals**

- ❑ Create Milestones in Writing and Assign Person Responsible
- ❑ Establish Evaluation Tools: what will be evaluated, how the data will be used, and what data is needed.

**Step 3: Design and Develop the Project**

**Know the Development Cycle: Design, Feedback, Pilot, Roll-Out**

**a. Design Phase**

- Cost of Change is Exponential as Project Proceeds
- Step by Step Page by Page, Mock-Ups and Re-writes
- No software development cost for designs not implemented

**b. Incorporate Feedback**

- Walk through with ALL team members
- Who else is a stakeholder? Who else CAN give feedback?
- The sooner incorporated the cheaper the cost

**c. Pilot/Test**

- Collect this and send it out to EVERYONE, especially your partners.

**d. Feedback and Testing**

- How do YOU measure success?
- How can you make it even better?

**e. Deployment and Roll-out**

- Develop Written Deployment Plan
- Step by step Instructions
- Leverage Vendor Support Programs
- Incorporate Version Changes
- Training
  - ❑ Who should train
  - ❑ Leverage your Partners/Vendors
  - ❑ Leverage your Users

#### **Step 4: Checklist for Maintenance and Support**

- ❑ Articulate how will project be maintained
- ❑ Identify who will staff the support
- ❑ Outline the needs and implementation plan for revision and updates
- ❑ Determine how and when technology will be upgraded
- ❑ Beware of Vendor Finger-Pointing (if more than one vendor works on your project, neither may take responsibility to fix a problem.)
- ❑ Track Success and Feedback; Circulate to your Partners
- ❑ Outreach and Market Your Project: Make sure it is used by the intended users

#### **Step 5: Sustaining the Project**

Sustainability of a project involves several factors.

- ❑ Is the technology sustainable? Will it remain relevant to solve the intended problem?
- ❑ Is it integrated within the community and used by the intended users?
- ❑ Is it integrated within your partnership networks?
- ❑ Is it sustained by funding?
- ❑ Is it staffed to handle revisions, management, upgrades, and incoming feedback?

While fundraising is never easy, it is clear that if a project solves a problem, is used by the clients for whom it is intended, and is integrated among several and new partners; fundraising and sustainability become much easier. In order to sustain it, the project has to work, be perceived as working, and be used.